



**Lawrence Berkeley National Laboratory
Project Management Office**

PROCEDURE Page
1 of 4

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Title:

CONTROL ACCOUNTS, WORK PACKAGES & PLANNING PACKAGES

Section where used:

Project Management

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1.0 PURPOSE

A control account is a management control point at which budgets (resource plans) and actual costs are accumulated and compared to earned value for management control purposes. Work Packages are a subdivision of a control account and consist of a discrete, apportioned, or level of effort task that has been planned and budgeted in detail. Planning packages are created to describe work within a control account that will occur in the future.

2.0 SCOPE

This procedure applies to all LBNL projects using the LBNL Earned Value Management System (EVMS) reporting.

3.0 REFERENCES

DOE Order 413.3.
LBNL Earned Value Management System Description.
PMO Procedure 1.1, Project Plan.
PMO Procedure 1.2, Work Breakdown Structure (WBS).
PMO Procedure 1.5, Control Account Plan/Work Authorization.
PMO Procedure 1.7, Cost Estimating.

Title**CONTROL ACCOUNTS, WORK PACKAGES & PLANNING PACKAGES****4.0 PROCEDURE****4.1 Control Accounts**

A control account is a natural management point for planning and control since it represents the work assigned to one responsible organizational element on one project work breakdown structure element.

4.2 Work Packages

Work packages are a subdivision of a control account and consist of a discrete, apportioned, or level-of-effort task that have been planned and budgeted in detail. The budget for each is segregated into elements of cost. Work packages constitute the basic building blocks used in planning, measuring accomplishment, and controlling project work.

4.3 Planning Packages

Planning packages are created to describe work within a control account that will occur in the future. Planning packages must have a work scope, schedule, and time-phased budget.

4.4 Control Account Plan

The Control Account Manager (CAM) develops detailed plans, including work packages and planning packages when necessary, to insure the control account scope, schedule, and budget is consistent with project objectives and is achievable. Budget backup should be attached to the Control Account Plan/Work Authorization form, when necessary. The CAM proposes the Earned Value (EV) method to be used to track each work package.

4.5 Responsibility

After the Project Manager has developed planning guidance including a work scope, schedule milestones, and deliverables for each control account, they will discuss the plan with the assigned CAM. The CAM will be responsible for preparing detailed schedules and cost estimates for the Control Account, and further subdividing the work into Work Packages and Planning Packages. The CAM develops a Control Account Plan with a control account allocation and control account procurement list if applicable. The Control Account Plan is documented on the Control Account Plan/Work Authorization form, which is signed by the CAM and submitted along with the supporting information to Project Controls. Project Controls reviews the Control Account Plan to confirm

Title**CONTROL ACCOUNTS, WORK PACKAGES & PLANNING PACKAGES**

that the Plan is consistent with the project objectives, and enters the control account data into the project EVM system. After collection of data from all control accounts, Project Controls reviews the project schedule and budget with the Project Manager to assess their consistency with project objectives. The Project Manager will discuss with the CAMs revisions to the Control Account Plans, if necessary. Once the Control Account Plans are acceptable, the Project Manager signs the Control Account Plan/Work Authorization form. Project Controls uses the approved control account information to set the project Performance Measurement Baseline.

5.0 APPENDIX

Appendix A: Control Account and Project Planning/Approval.

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| Title APPENDIX A: CONTROL ACCOUNT AND PROJECT PLANNING/APPROVAL |
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